Project Definition
For
Department of Energy
BMIS-FM
Project

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Approvals

This document has been approved by the following people. The signed approval forms are filed in the Project Control Book.

Name	Function
Michael Fraser	DOE BMIS-FM Project Manager
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Distribution

This document is available electronically to all DOE BMIS-FM Project personnel via the Project Office software.

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1 Preface

This document provides a summary of the important characteristics of the project as developed at the Project Definition Workshop held at the IBM facility in Gaithersburg, MD, on September 20, 2000.

Its purpose is to:

- Confirm the understanding of the project charter by the delivery organization.
- Provide sufficient information about the solution and approach that the sponsor and delivery organization can agree to proceed to the Prepare Phase.
- Provide a framework upon which more detailed plans can be built.
- Document the delivery organization's plans for completing both the Prepare Phase and the Focus Phase.

2 Project Description

This section describes the project and its background.

2.1 Project Scope

The BMIS-FM project replaces and expands upon the functionality of several existing systems currently in use at DOE. These include DISCAS, MARS/FIS and FDS. In addition, the project includes interfaces with two key sources and users of financial information, integrated contractors, and legacy systems. The following general functions are to be addressed: budget execution/funds control, accounts payable, accounts receivable, cost accumulation and distribution, general accounting, financial reporting, fixed-asset accounting, purchasing, budget formulation and project accounting. Over a planned period of 24 months, these functions will be implemented at three service centers (Germantown, Oak Ridge, and Albuquerque) and their associated satellite centers. The new system applies to the entire Department, except for the Federal Energy Regulatory Commission and the Power Marketing Administrations. It should also be noted that financial functions supporting the National Nuclear Security Administration are to be designed, but must be designed to be separable from the BMIS-FM system.

2.2 Business Need

This project is a result of the DOE BMIS-FM Business Case that was developed following the guidelines set forth in the Clinger-Cohen Act of 1996. The DOE current environment consists of legacy systems which have been highly customized and fine-tuned to support DOE accounting needs over two decades. With these systems, DOE has maintained a "clean audit opinion" in recent years. DOE has a desire to maintain its record of excellence with continuing clean audit opinions. It recognizes that its current systems will break sooner rather than later, and desires to transition to a COTS-based system on an orderly basis so as to maintain a clean audit opinion. It should be noted that maintaining a clean audit opinion is an overarching objective, not to be compromised during system development. Additionally, the new system should perpetuate or enhance the Department's current critical accounting, budget execution, and cash management activities.

DOE is currently embarking on a long-term project to develop a department-wide Enterprise Resource Planning (ERP) system. The first phase of this system is CHRIS, which is the human resources system. The second phase of this system, also known as BMIS-FM, is development of the Core Financial System, which is the subject of this project. Therefore this project must be viewed in its larger context of being a part of the overall DOE ERP, rather than being viewed as a stand-alone, "stovepiped" system that simply replaces legacy systems. With this in mind, there are several functions (budget formulation, travel, procurement, and others) that are being considered for eventual inclusion

with the DOE ERP. To this end, DOE wishes to maintain a system that has extensibility and growth potential.

2.3 General Requirements

In addition to the functions noted above, DOE is looking for the installed and operational BMIS-FM to have several general characteristics. These include:

- Compliant. The system must be compliant with applicable legislative regulations, executive orders, OMB Circulars and other policy such as JFMIP.
- Trained. The staff using the system must be fully trained on its use at the time of system cutover. Refresher training and training for new employees is also important on an on-going basis.
- Staffed. After month 36, the system must be fully staffed by DOE personnel or support contractors. The support emphasis will be on creating a framework of DOE self-sufficiency.
- Certified. The system must be certified by the CFO before system cutover.
- Interfaces. All interfaces to legacy systems must be in-place and functioning at system cutover.
- Documentation. The system must be fully documented, either in hard copy or by electronic means, such as on-line help files.
- Smooth Transition. The system cutover must be smooth.
- Data Conversion. Means for accurate data conversion must be tested in advance and must support the system cutover.
- Self-Sufficiency. The DOE must be self-sufficient when the project is completed. That is, they must be able to operate, maintain, and update the system without having to rely on the integration contractor.

3 Product Breakdown Structure

This section describes the BMIS-FM system in terms of its components, and breaks the system down into a product-oriented structure. This information is used to develop the formal WBS, schedule, and strategic direction of the project. The WBS is an ordered and numbered list of activities and milestones. The schedule time-phases these and notes dependencies. The strategic direction document describes each item, provides entrance and exit criteria (which are measurable and quantifiable so as to ensure no confusion over whether an item is done), assigns responsibility, and provides information regarding the dependencies. The responsibility for the WBS, schedule and strategic direction of the project reside in the Project Management Office, as indicated below.

Level One of the WBS is BMIS, itself. This choice recognizes that the overall BMIS-FM program is the overarching or umbrella program supported by the IBM proposal solution based on the ERP built on Oracle Federal Financial software. To deliver this, an Integrated Product Team (IPT) composed of DOE personnel and TeamIBM personnel, has been organized. The IPT is responsible for the design, implementation, installation, training, cutover, and system cutover of BMIS-FM. This WBS breaks this large task into manageable pieces and assigns responsibilities within the IPT.

The following paragraphs address Level Two items.

3.1 The Configured System

The configured system means the hardware, COTS software, and the configuration of the COTS software that turns it into BMIS-FM. It is further broken down into sub-components:

3.1.1 Hardware

The hardware consists of three IBM RS/6000 boxes, plus a server on which to run Oracle Tutor. The hardware area is a major element of I/T and also includes I/T related services. The TeamIBM I/T point of contact is Kevin Shaver, and he will work with Dave Dowdell from DOE who is his counterpart.

3.1.2 COTS Software

The COTS software consists of the Oracle database, Oracle Federal Financials, operating systems, and Oracle Tutor. It also includes IBM Project Office. Paul Bury, of IBM procurement, is responsible for obtaining the software and providing it to the I/T team for installation. In addition, there are bolt-ons needed to complete the required functionality. Identification of these bolt-ons belongs to Tim Henson and his as-yet-unidentified DOE counterpart. Once the bolt-ons are identified, the acquisition belongs to Paul Bury and the implementation moves under software configuration.

3.1.3 Software Configuration

The software configuration includes all those actions required to configure Oracle Federal Financials for use as BMIS-FM. The lead for this activity is Tim Henson of TeamIBM. His DOE counterpart is not yet identified.

3.2 Project Management

IPT leadership is provided by Michael Fraser of DOE and Don Cox of TeamIBM. The deputy program manager is Ben Joyce of TeamIBM. The business manager is Rene Moreau of TeamIBM.

As part of the project management, the IPT will use Project Office, a project management software tool that includes a data repository. Project Office will stay with DOE when the project is finished. Project Office is a web-based tool that will run on a DOE-provided Domino server which is yet to be identified. All IPT personnel will use Project Office as a repository for documents created on the project, as a communications vehicle, and for status reporting.

The project management office is responsible for the development of the WBS, schedule and strategic direction of the project as described above. This is done during the Prepare Phase.

3.3 Systems Integrated Design

The system integrated design, meaning the placing of BMIS-FM in context with all the other systems with which it interfaces, is the responsibility of the IPT. Both the TeamIBM architect and the DOE architect who are accountable are not yet identified.

The product of this activity is the implemented interfaces necessary to operate BMIS-FM. In addition, this area includes responsibility for the implementation strategy (to include MARS and the other DOE legacy systems identified in the DOE Statement of Work), protocols associated with interfaces, requirements decomposition and documentation, requirements validation, and an operations concept.

3.4 Deployment

The product of deployment is a system cutover to BMIS-FM and any necessary follow-up at the three primary DOE service centers plus their supported satellite offices. A deployment owner for TeamIBM and for each of the three service centers have not yet been identified. These deployment owners will be in charge of all necessary activities to ensure successful site activation, including coordinating site-specific configuration, training, and scheduling with site personnel. The deployment owners (from TeamIBM and DOE) have ultimate responsibility for successful system cutover.

3.5 Training

The training group is to ensure that all appropriate training is developed and delivered to all whom need it to ensure a successful system cutover of BMIS-FM across DOE. This includes training of all categories of users including project personnel, BMIS-FM superusers, core users, and value users. It includes standard Oracle training as well as tailored, BMIS-FM specific curriculum development and delivery. Ben Joyce of TeamIBM and Dean Olson of DOE are responsible for training.

3.6 Cultural Change

The IPT is responsible for managing the cultural change aspects of the transition to BMIS-FM so that it is widely accepted by all who use it. This means ensuring organizational readiness for change, and may include business process changes as required. A particular challenge is to bring disparate processes together where there are site-specific differences that result in the same end product. The DOE lead is responsible and is currently unidentified. Anne Taylor of TeamIBM brings consulting expertise and intellectual capital to guide this transition.

3.7 Testing

The testing activity ensures that BMIS-FM meets requirements, certifies it, and indicates readiness for system cutover. The DOE and TeamIBM leads for testing are not yet identified. Tim Henson and his DOE counterpart are responsible for "unit" testing of BMIS-FM. An independent contractor will be identified to do an independent verification and validation (IV&V).

3.8 Documentation

There are many documents and types of documentation to be delivered on the contract. Since this is a separate contract line item (Performance Objective D.1), overall responsibility to track and ensure successful completion of the documentation is assigned to the Project Office to Rene Moreau of TeamIBM and Jo Buxton of DOE.

3.9 Support Services

Team IBM will deliver support services to DOE as required. One that is specifically listed as an option in the contract is support services in the area of Standard General Ledger (SGL) conversion. The current plan is for DOE to map and potentially convert their legacy systems to SGL prior to conversion to BMIS-FM, so the level of support services is not yet clear. They remain available, however.

3.10 Data Conversion

The IPT is responsible for moving appropriate data from the legacy systems to BMIS-FM. Tim Henson and his DOE counterpart will identify the data to be converted and work with the architects to design and test the methods used for that conversion. The data itself will be moved during system cutover activities.

3.11 Operations and Maintenance Support

TeamIBM is providing hardware and software maintenance support. DOE provides a venue for the hardware and provides DOENet. As soon as the first user goes through system cutover, the system is in an operations and maintenance phase. The IPT will therefore provide a help desk. The mechanisms for this are TBD at this time.

4 Schedule

This section describes top-level information regarding the schedule. It should be noted that the basic approach to the project is to use the IBM Method Blue. Method Blue describes various phases, along with an extensive list of products for each phase, that help ensure an orderly approach to an ERP project. One advantage of using Method Blue is the extensive list of templates available to jump-start the various deliverables.

4.1 Moving from the Proposal Schedule to the Project Schedule

The schedule presented in the proposal is being modified in a number of areas. These are discussed below:

- Twenty-Four Month Baseline. The 24-month characteristic is being maintained because it has been widely disseminated that BMIS-FM will be implemented in 24 months.

- Conflict with Year-End Close. The original schedule assumed an implementation at the first site at the end of a year's elapsed time. Working forward from the contract initiation date, this puts the implementation right at the point where the first site (Germantown, also known as the Cap Center and related offices) will be very busy with year-end close. The mitigation is to delay the system cutover at the Capital Service Center until a reasonable period of time after October 1, 2001.

- Slow Project Start. Both DOE and TeamIBM are staffing at a measured pace. This is delaying the development of products associated with the Prepare Phase. In addition, funding profile issues at DOE are delaying the purchase of the hardware and COTS software by a month past the start of the formal project. This leads to a slight stretch in the Prepare Phase.

- Early Involvement by All Sites. The proposed schedule repeated the methodology for each of the three sites. It is more desirable to involve all parties at the beginning so that the Version 1 system meets requirements for all three sites, with a subsequent phased rollout. This will allow compression of the time between the first rollout and the subsequent rollouts.

4.2 Schedule Information Developed at PDW Workshop

This section summarizes schedule information developed at the PDW workshop with many key participants available, and represents a current consensus. The project is divided into phases consistent with Method Blue.

4.2.1 Prepare Phase

The Prepare Phase runs into November 2000 and ends in a kickoff meeting. At the kickoff meeting, the following items are available.

- People. All the people assigned to the project for the Focus Phase are identified and available to the project. They should all attend the kickoff. The organization chart is available and approved. Reporting chains are set up and functioning.

- Facilities. Office space is available with furniture, computers and network connections. DOENet userids are established and passwords available. Issues regarding TeamIBM member's capability to access their company networks have been addressed and solved.

- WBS and Related Items. The Work Breakdown Structure, schedule, and strategic direction document are completed and available to all project members. These items include assignments to individuals and are under baseline control. The schedule is a coordinated schedule.

- Hardware and Software. The hardware and COTS software are in place and up, including all elements of the development environment. Administration is ready to provide access to appropriate project personnel, with account names and passwords available at the kickoff.

- Project Office. The Project Office tool is up, running and populated with available documentation. Reporting methodologies are established and ready for promulgation. Administration is ready to provide access to appropriate project personnel, with account names and passwords available at the kickoff.

- Mini Project. The mini project from the proposal phase is available for people to get the "look and feel" of the Oracle Federal Financials.

- Initial Project Team Training. The initial training for the project team has been arranged so that DOE team participants can get the necessary training "just in time."

- Initial Cultural Change Management Activities. The communications plan is validated and updated and the project team conducts communications activities as appropriate.

4.2.2 Focus Phase

The Focus Phase will have a duration of approximately 4 months and result in a meeting to decide readiness to go into a Pilot Phase. The following items are products of the Focus Phase:

- Operations Concept. An operations concept describing user interaction and the system in context with other systems is done early in the phase.

- Requirements Analysis. Processes are identified for movement to BMIS-FM and requirements are identified and documented in accordance with the methodology.

- Gap Analysis. A gap analysis has been completed showing all areas where Oracle Federal Financials cannot meet requirements. Decisions are made regarding whether to redefine the DOE processes, use a bolt-on, or develop a user-exit-type set of specialized code. The first option is most desirable and the last option is the least desirable.

- Training Planning. Curriculum requirements are being developed and training planning is well under way. Those needing training have been identified and the nature of the training required is known.

- Cultural Change Management Planning. The IPT conducts an organizational readiness assessment as a basis for developing a Cultural Change Management Plan. Ongoing communications activities continue as planned. Project leaders are identified and provided with the tools they need to fulfill their roles in the project.

- Interface Documents. ICDs are developed with other systems and negotiated.

4.2.3 Conference Room Pilot

The conference room pilot phase is where the requirements are implemented into the Oracle Federal Financials. To do this, the group headed by Tim Henson and the TBD DOE counterpart will turn the requirements into design documentation. This will result in a large set of design documentation to be actually implemented in Oracle Federal Financials.

Note that the Chart of Accounts is needed by January 15, 2001. It is desired earlier, but there will be slips in the schedule if this is not available by that time.

4.2.4 Implementation

This phase is the first activity under the Implementation portion of the contract (Performance Objective A.2). This phase uses the extensive design documentation to implement the design into Oracle Federal Financials, and is accomplished by the IPT, under the direction of Tim Henson of TeamIBM and his DOE counterpart.

The result is a first build of BMIS-FM that has been unit-tested.

4.2.5 Testing

During this phase the IV&V testing is conducted by an independent party with IPT support. The result of this phase is the IV&V report, any required rework, and a system that is ready for installation.

4.2.6 System Cutover at Cap Center

A system cutover date of November 15, 2001 was suggested at the PDW workshop, with a two week window before and after that suggested date. There are a number of concerns about this date given the activities associated with year-end close and the closeness of the holidays. This activity includes the site training, data conversion, system cutover, and post-system cutover support.

4.2.7 System Cutover at Oak Ridge

No date was established for Oak Ridge system cutover. However, given the effort during earlier phases to include Oak Ridge requirements and with the lessons learned from Cap Center implementation, it should be possible to compress the six months given in the proposal schedule.

4.2.8 System Cutover at Albuquerque

No date was established for the Albuquerque system cutover. However, given the effort during early phases to include Albuquerque requirements, and with the lessons learned from both the Cap Center and the Oak Ridge implementations, it should be possible to compress the six months given in the proposal schedule. In addition, it should be possible to have Albuquerque live before the 24 month deadline.

5 Organization and Staffing

DOE is working internal staffing and TeamIBM is in the process of assigning staffing to its team positions. Michael Fraser has developed a preliminary organization chart for the IPT as a whole. These items are discussed in a DOE paper, "Project Resource Plan (Draft)," Version 2, dated September 26, 2000, or the latest version. The final approved plan will be posted.

6 Management Systems

This section discusses various management systems.

6.1 Performance Controls

This section discusses the various methods use to determine project status and report progress and problems. The operative phrase is "no surprises," meaning early detection, problem solving and candid communication, and emphasis is on leading (rather than lagging) indicators. A number of ideas were discussed during the PDW. These include:

- Earned Value Management System (EVMS). The project will use earned value to determine progress. This covers both schedule and cost. Doing this successfully may require interim calculations based on hours as it takes dollar information a while to work its way through the system.

- Exception Reports. Exception reports are available to every member of the IPT to provide a vehicle to bring problems to management's attention for immediate resolution. Sometimes these are called "Red Flag" reports, and are directed to Michael Fraser and Don Cox. These will be resolved as urgency requires.

- Technical Performance Measures. The architect will develop several technical measures to determine status of ongoing operations. These may include service level measures such as availability, downtime, MTTR, and so on. They may also include number of requirements, lines of code, code errors, and so on.

- Rate Charts. These map progress against objectives, such as in number of people trained, and design items implemented.

- Weekly Status Report. A weekly status meeting will be held at which the team leads report their progress to Michael Fraser and Don Cox. Charts will be collected into Project Office and Project Office used to generate reports.

- Monthly Cost Report Meeting. A week or so after the close of the IBM accounting month, formal cost reports will be reviewed by Michael Fraser and Don Cox. Charts will be collected into Project Office and Project Office will be used to generate reports.

- Daily PM to PM Calls. Michael Fraser and Don Cox will either meet or telephone each other at least once per business day. Each of the team leads (from TeamIBM and DOE) will follow the same practice.

- Monthly QA Meeting. The program will have a monthly QA program review to ensure quality measures are being addressed and any issues surfaced.

- Daily Status Meetings. Each team is to meet frequently, perhaps daily, to ensure full and complete communications between all team members. Various IT collaboration tools will supplement face-to-face communications since we will be relying at times on virtual teams.

6.2 Contract Change Management

This section discusses vehicles in place to manage change to process scope. A change management process includes identification of baselines and a process for floating proposed changes and getting timely resolution of those changes. The items to be controlled via baselines include the following:

- WBS/Schedule/Strategic Direction. The WBS, schedule and strategic direction for the project as defined in the proposal are the current baseline. It is already clear they need to be modified, as noted above.

- Contract. The contract itself is baselined and goes through a formal process for change involving DOE and IBM contracts. The most current contract baseline is available on Project Office. Note that the contract is a “task order” as part of IBM’s GSA contract.

- Processes. The processes to be implemented in BMIS-FM are baselined.

- Requirements. The requirements derived from the processes are baselined. The design document resulting from these is baselined also.

- Software. The versioning of the BMIS-FM software is baselined. The configuration resulting from the design and implementation activity is baselined.

- Hardware. The versioning and configuration of the hardware and operating systems is baselined.

A configuration control board (CCB) will meet at defined intervals (monthly or prior to a major review) to consider accumulated changes and will meet at additional times as required to consider urgent changes. The configuration control board is chaired by Michael Fraser and is co-chaired by Don Cox. The members of the configuration control board, who have a responsibility to evaluate changes for impact prior to the meetings, are Ben Joyce (DPM and training), Dean Olson, Warren Huffer, Tim Henson and DOE counterpart, Anne Taylor and DOE counterpart, Kevin Shaver and DOE counterpart, and the DOE deployment lead from each of the three service centers. Membership may need to be adjusted during the project as it evolves. Rene Moreau as Business Manager acts as secretary to the

CCB and is responsible for distributing proposed changes and setting the agenda and time/place for the meeting.

6.3 Action Item Management

Action items are controlled by the Business Manager, Rene Moreau. They are collected, tracked and driven to resolution at the weekly status meetings, with interim work as required. An action item is defined as a non-plan-driven activity on which all parties are in agreement but for which work must be done to create a defined outcome.

6.4 Issues Management

Issues are controlled by the Business Manager, Rene Moreau. They are collected, traced and driven to resolution in the weekly status meetings, with interim meetings as required. An issue is defined as something for which there are unknowns or for which there is not agreement. While we may structure discussions around issues, the intent is to stay proactive, not reactive, and use results of issue discussions to revise baseline plans.

A number of issues were raised at the PDW. These are as follows:

- Clear team accountabilities (because not all project personnel are identified). Assigned to Michael Fraser and Don Cox with resolution by the end of the Prepare Phase.

- Data conversion/data history. How much data is to be converted into BMIS-FM from legacy systems? Just account balances? Assigned to Tim Henson, due January 1, 2001.

- Define the performance criteria for Performance Objective A.3. Assigned to Michael Fraser and Don Cox, with resolution by the end of the Prepare Phase.

- Determine the SGL option strategy. Investigate SGL conversion alternatives that do not require conversion of the legacy systems prior to BMIS implementation. Determine level of effort required by TeamIBM as part of the SGL conversion. Assigned to Warren Huffer and Don Cox, due November 2000.

- Business structure decisions. Assigned to Ike Smith and Tim Henson, to be resolved by January 15, 2001.

- Bar Coding and Electronic Signatures. What are the requirements? Do these bolt-ons really need to be ordered? Assigned to Tim Henson and his DOE counterpart, with resolution by January 2001.

- Development of a deployment accountability model. Who owns it? Assigned to Michael Fraser and Don Cox, due by the end of Prepare Phase.

- Role, responsibility and methods of IV&V testing. Currently undefined. Assigned to Michael Fraser and Don Cox, due by the end of the Prepare Phase.

- Budget Formulation – strategy for integrating this capability with the BMIS-FM baseline. Assigned to Michael Fraser, due by the end of the Focus Phase.

- Define exit criteria for performance objective A.1 (design) versus entry into implementation (A.2). Currently defined per discussion at the meeting as outlined in the schedule section above. Assigned to Michael Fraser and Don Cox, due at the end of the Prepare Phase.

- Chart of Accounts. TeamIBM has a serious dependency here on DOE. Assigned to Warren Huffer, refer to discussion in schedule section above. Due by January 15, 2001.

- Clear products of weekly and scheduled reviews. Assigned to Rene Moreau, due at the end of the Prepare Phase.

- Change Control Process and Mechanism. Assigned to Rene Moreau, due at the end of the Prepare Phase. Defining this process and mechanism is a joint responsibility with ultimate DOE accountability.

7 Risk Identification

A risk identification exercise was held at the PDW. The results were divided into key risks ("top three") and other risks. There will be a mechanism to track and periodically review program risks during the execution of the program by means of a risk board, chaired by Michael Fraser and Don Cox.

7.1 Key Risks

The following items were identified as risks of particular importance. These will be discussed at the Kickoff to the Focus Phase with emphasis on a mitigation approach. We recognize that there are other known risks in the technical, schedule, budget, staffing and policy areas. We will be developing strategies to mitigate the known major risks and promote early detection and mitigation of unknown risks.

- Funding. The funding available to the government does not match the funding required for the project. This may result in delay or deferment of some work. Managing the funding issue will be key to successful project completion.

- Loss of Key Federal Personnel. Many key performance personnel on the DOE side are eligible for retirement within the next three to five years. This can result in a loss of continuity. One mitigation approach is to use new hires, particularly new college hires, in positions of responsibility so they can become long-term key personnel.

- Changes to DOE Senior Management and Resulting Loss of Support for the Project. A number of key executive supporters have or are scheduled to leave the Agency. In addition, the election may result in large-scale changes to the Agency leadership. This will require Michael Fraser and other stakeholders to continually review support requirements with executive management.

- Inability of DOE to meet Critical Path and Schedule. This appears largely to be a staffing issue, but also has to do with the service centers' ability to make the transition at the required times.

- Uncertainty of Commitment from non-CFO organizations in DOE.

- Staffing Issues. Limited pool availability. This affects both the DOE and the contractors.

- Process Improvement. This refers to inability to identify all the processes that will require conversion and the inability to make quick decisions on a new or common process.

7.2 Other risks identified at workshop

Here is a listing of the other risks identified during the PDW workshop.

- Undocumented reports and interfaces.

- Fundamental changes in business practices.

- Minimizing local requirements.

- Critical gaps, such as reimbursable work, recasts, integrated contractor relationships.

- Impact on and interfaces with integrated contractors.
- Changes due to new program requirements.
- Underestimating change requirements or an unwillingness to change.
- Key personnel losses.
- Change of administration – change in Department priorities and champions.
- Change in external requirements.
- Turbulence during project.
- Required level of effort and need for a logistics/planning "owner" of interfaces with integrated contractors.
- Funding continuity – a solution for a funding decrement scenario would involve designing the BMIS-FM functionality in as modular a fashion as possible.
- New administration – priorities change.
- Staffing, trained, right resources.
- Just In Time training. Solution has to do with being unable to perform job responsibilities.
- Will the design for Cap Center be too specific? A solution is to have all 3 centers involved, understand the design, and have remote buy-in.
- Relationship with other projects, e.g., payroll and travel. Solution – make early successes visible, good communications.

8 Summary

This paper summarizes our understanding of the project as of the time of the Project Definition Workshop. Many actions are required to move this understanding into the products necessary for the Kickoff Meeting to be held at the end of the Prepare Phase that jumps into the Focus Phase.